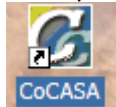


CoCASA Training Manual

CoCASA can be downloaded from the CDC web site at: <http://www.cdc.gov/nip/cocasa/>
CoCASA - Comprehensive Clinic Assessment Software Application is a software tool used to assess immunization rates & service delivery practices. Data gathered from assessments of providers are used to improve immunization coverage & standards of practice.

Noted changes from WinCASA:

- The layout has changed to be more user friendly.
 - Import/Export function have been enhanced. Provider data can be imported from various sources.
 - Report design & functionality has been expanded & improved.
 - Tutorials have been added to meet specific learner needs.
 - Resources are easily accessed to provide additional assistance where needed.
-
- Locate the CoCASA icon on the desktop & double click on it.



User Profiles

- For first time users, the User Profile Screen will pop up. The purpose of this screen is to create a User ID. When completed, this ID will consist of 8 characters.

A screenshot of the 'User Profile' dialog box. The title bar says 'User Profile'. Inside, there's a section for 'User ID' with three text boxes for 'First', 'MI', and 'Last'. Below that, a message says 'If these are not the initials you wish to use as a unique identifier, please change them now.' followed by a text box containing 'XXX' and the word 'Required'. Below that is a 'Zip' text box containing '00000' and the word 'Required'. Then there are two radio button questions: 'Would you like to require a password to access CoCASA?' with 'Yes' and 'No' options (where 'No' is selected), and 'Would you like to access the AFIX/CoCASA Course?' with 'Yes' and 'No' options (where 'No' is selected). At the bottom are 'OK' and 'Cancel' buttons. The text 'Screen 0.1' is in the bottom right corner.

- The first 3 characters will assume the initials in your first, middle, & last name. (enter your First name, Middle initial, & Last name)
- The next 5 numerals will match your zip code. (enter your zip code)
- You do have the option of choosing a Password. However, if you choose to use a Password, you will need this every time you access CoCASA. You should write your password down & keep it in a safe place. CoCASA software does not track passwords!
- You have the option to access the AFIX/CoCASA course at this time, chose no. Then click "ok".

Next, the **Log On** Screen appears with the user's(s) name listed in the menu. Make sure that the correct user is selected in the menu list, and then click on "**Log On**".

Provider Setup

The "**Choose a Provider**" list box contains the list of providers who are in CoCASA. Currently "**Sample Clinic**" is the only provider listed.

- The green checkmark indicates this provider is current or active in the database.
- Click on the "**Add**" button to add a provider. The data in the lower portion of the screen is cleared & ready for data entry for your new provider information.

- **Provider Site Name:** enter the clinic's name
- **Contact Name:** enter the contact person's first & last name
- **Street Address 1:** enter physical address of clinic
- **Street Address 2:** this would be if they had a PO Box for mailings
- **City/State:** enter the city & State
- **Zip Code:** this is a required field that needs to be completed!
- **Office Phone:** enter area code, then number
- **County:** enter county this clinic is located (ie:Ada)
- **Fax:** enter area code, then number
- **Region:** this would be your district (ie:4)

The screenshot shows a section of the CoCASA form with three input fields:

- VFC number:** A text input field with a red asterisk and the text "<- Required" to its right.
- EMail address:** A text input field.
- Provider type:** A dropdown menu with a red asterisk and the text "<- Required" to its right.

 Below the dropdown menu is a tab labeled "Specify" which is currently inactive.

- **VFC Number:** this is a required field that needs to be completed! (use your assigned VACMAN PIN number)
- **Email Address:** optional
- **Provider Type:** this is a required field that needs to be completed! Use the drop down bar to scroll through the provider types. All Health Districts will be known as: **"PUBLIC HEALTH DEPARTMENT OPERATED CLINIC"**

The screenshot shows two questions:

- How many physicians are practicing at this site?** A text input field containing the number "3".
- Is the provider enrolled in the VFC Program?** A radio button question with two options: "Yes" (which is selected and highlighted with a yellow circle) and "No".

- **How Many Physicians are practicing at this site?** Optional (leave blank)
- **Is the provider enrolled in the VFC Program:** "YES"

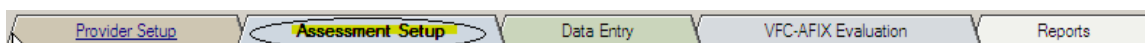
IMPORTANT NOTE: There are 3 required fields in CoCASA that must be completed! **Zip Code VFC Number Provider Type**

CoCASA has an Automatic Save feature. Clicking on any of the following options will trigger CoCASA to save data:

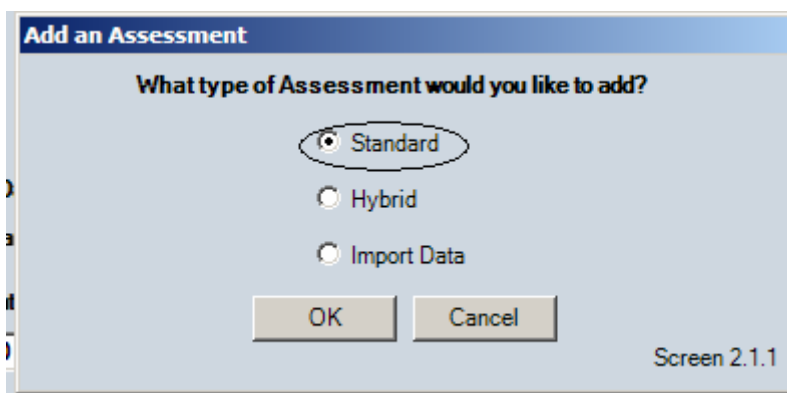
- A different provider in the Choose a Provider list box
- Any of the buttons to the right of the Choose a Provider list box, except for Cancel
- Any of the other primary CoCASA tabs
- Any menu item, or
- The Close box

Assessment Setup - Setup Criteria

IMPORTANT NOTE: To set up an assessment, select the provider in the "Provider Setup" screen, before going to the "Assessment Setup" field.



- Click on the "Assessment Tab", this will open up the "Setup Criteria" screen. On the "Assessment Setup" screen, the clinic name appears at the top left; indicating which provider this Assessment Setup is for.
- To begin setting up assessment criteria, the assessment method must be identified. Click on the "Add" button, this will open up the "Add an Assessment" screen.



- You have three options to choose from. Click on "Standard", this method collects data that will produce an estimated immunization coverage level. Click "Ok" to continue.

Setup Criteria:

- The "Choose Assessments" list box is currently empty but will be populated when "Setup Criteria" has been completed.

Assessment Date	<input type="text" value="01/25/2006"/>
Assessment Name	<input type="text" value="Sample Clinic 1/25/2006"/>

- The Assessment Date field defaults to the current date. Change this date to the actual date of the annual AFIX visit.
- The Assessment Name can also be changed if you choose to do so. The default assessment name is the provider name plus the current date.

Age Range for this Assessment

From To ☒ Months ☐ Years As Of

Pull Charts with Dates of Birth Between

Earliest Date of Birth Latest Date of Birth

- **Specify the Age Range for this Assessment:** type in "19" and "35", click on "months".
- **"As Of"** defaults to the current date. Change this to the date of the annual AFIX visit. **"As Of"** date is also referred to as **"common assessment date"**. What this means, children included in this assessment will be 2 years old or 24 to 35 months of age, **"As of"** this date.
- Press either the **"Enter"** or **"Tab"** key.
- Based on the **"As Of"** date entered, CoCASA automatically generates the dates of birth which populate the **"Earliest"** and **"Latest Date of Birth"** fields.

What is the estimated number of patients served by the provider in the designated assessment cohort?

Daily Use Mode ☒ No ☐ Yes

- What is the estimated number of patients served by the provider in the designated cohort? Enter the appropriate number.
- Will you be activating the **"Daily Use Mode?"** This will automatically default to **"No"**. Leave this **"No"**.

Important Note:

To verify that this **"Assessment Setup"** is listed in the **"Choose Assessments"** list box, click again on **"Setup Criteria"**. The clinic is automatically saved and added to the list. The green checkmark indicates that the clinic is now active. The (S) indicates that this is a **"Standard"** assessment.

Assessment Factors:

To continue with **"Assessment Setup"**, click on the **"Assessments Factors"** tab.

Setup Criteria **Assessment Factors** Custom Questions Antigens My Results

- Choose Demographic Fields: select "First Name and Last Name"

Setup Criteria | **Assessment Factors** | Custom Questions | Antigens | My Results

Click fields you want to appear on the Data Entry screens.

Choose Demographic Fields

- ☒ First Name
- ☒ Last Name
- ☐ Middle Initial
- ☒ Ethnicity

- Choose Patient Status Fields: select "Moved Or Gone Elsewhere (MOGE)"

Choose Patient Status Fields

☐ All ☐ None

- ☐ Adult on catch up schedule
- ☐ Child on catch up schedule
- ☐ Head Start Participant
- ☒ Moved Or Gone Elsewhere (MOGE)

- Choose Clinical Risk Factors: leave this blank

Choose Clinical Risk Factors

Alcoholism [New]

- ☐ Alcoholism
- ☐ Asplenia
- ☐ Asthma
- ☐ Cancer drugs

- Choose Diagnostic Screening & Testing: select "None"

Choose Diagnostic Screening and Testing

☐ All ☒ None

- ☐ Anemia Testing
- ☐ Blood Sugar Testing
- ☐ Cholesterol Screening
- ☐ Colonoscopy

- **Choose Counseling Events:** select "None"

- **Choose Other Assessment Factors:** select "None"

- **Record Vaccine Brand Names:** select "No"
- **Record Vaccine Manufacturer/Lot Number:** select "No"
- **Record Geographical Location of Dose Administration:** select "No"

Record vaccine brand names	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Record vaccine manufacturer / lot number	<input checked="" type="radio"/> No	<input type="radio"/> Yes
Record geographical location of dose administration	<input checked="" type="radio"/> No	<input type="radio"/> Yes

Antigens:

To continue with "**Assessment Setup**", click on the "**Antigens**" tab. You must select the specific antigens that will be used in the assessment. You will be using the 4:3:1:3:3 Series include Varicella, PCV, & Hep A.

- You will have two boxes for the Antigen.

Left side: List of Selected Antigens (this box is currently empty)

Right side: All ACIP Recommended Antigens (this box has all the antigens listed)

- You have several options to use to select the Antigens to be used in your assessment. Select the arrow pointing to the "**left**" button. This will move the selected vaccine to the "**List of Selected Antigens**" field. In order to move vaccines, you must highlight that specific vaccine then click on the "**left arrow**" button to move that vaccine. Choose the following:

- DTaP
- Polio
- Hib
- MMR
- HepB
- Varicella
- HepA
- PCV

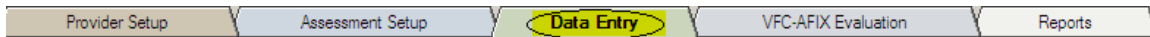
- Once the vaccines have been selected for the "**List of Selected Antigens**", you can use the "Move up" and "Move Down" buttons to sort your choices. Click on the "**My Results**" tab. My Results provides a summary of the assessment choices and can be printed for easy review.

Assessment Setup - My Results

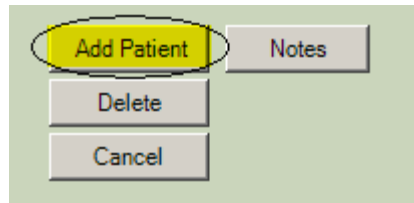
Assessment date: 1/25/2006

- You are now ready for data entry!

Data Entry



- Click on the "Data Entry" tab.
- To begin entering data, click on the "Add Patient" button.



- Enter demographic information from the patient chart. CoCASA asks for a full name and zip code. Date of Birth is required.

Demographic Fields

Last Name	<input type="text" value="Smith"/>	Zip Code	<input type="text" value="83704"/>
First Name	<input type="text" value="John"/>	Date of Birth	<input type="text" value="04/12/2003"/> <i>Required</i>
Middle Initial	<input type="text" value="H"/>		

- Do the same with the status fields.

Status Fields

Moved or Gone Elsewhere (MOGE)

- Click on the "Immunization History" tab to begin entering the immunizations.



- Before entering data, note the "Options to Copy Dates" function. When an immunization date is entered into the record, a Ctrl + F key can be used instead of retyping a date every time it is repeated.

Options to Copy Dates

Ctrl+F1: Ctrl+F2: Ctrl+F3: Ctrl+F4: Ctrl+F5:

Ctrl+F6: Copy First 3 Dates Ctrl+F7: Copy First 4 Dates F2: Copy Today's Date F3: Copy DOB

- Start entering the immunizations and dates. You can type in the last two numbers of the year, the rest of the year will populate. Use the tab key to proceed across fields.

Important Note:

(*Available if you selected "Brand Names" when setting up your Assessment Factors)
When a date for a combination shot such as Pediarix is entered into the first vaccine type (Example: Hep B) the remaining vaccines will be populated (DTaP and Polio) with the same date.

- After entering all immunization dates, you may select the "Reasons Not Given" tab to record any reason why an immunization was not given. Only enter "Reasons Not Given" when there is documentation in the patient's chart providing a valid reason for missing the vaccination. CoCASA will note what reason was given and analyze the data accordingly.

	Vaccine Not Given	Reason Not Given	Other RNG	Date of RNG (mm/dd/yyyy)
	Varicella	History of Varicella (chicken pox)		4/12/2004
*				

Important Note:

A date must be entered for "Reason Not Given".

- Select the "Other Visits" tab if the patient was in for another visit and did not receive an immunization. Only enter "Other Visits" when there is documentation in the patient's chart providing a valid reason for missing the vaccination.

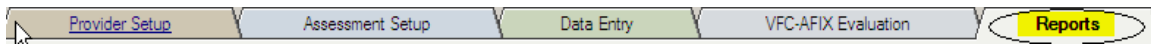
Visits for purposes other than immunizations:

	Visit Date (mm/dd/yyyy)	Visit Category	Other Visit Category	Diagnostic Category	Other Diagnostic Category
	12/15/2005	Visit for Illness		Upper Respiratory Infections	
*					

- Continue entering data for each patient then go to the "Reports" section.

Reports

- Click on the "Reports" tab.



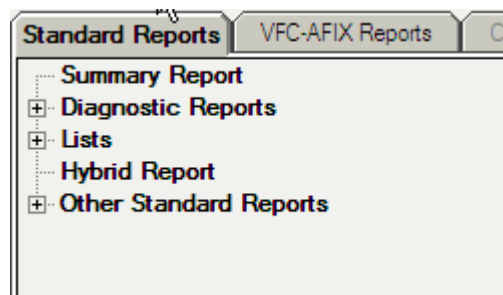
Important Note: You will use the "Standard Reports" tab for running the required reports for your clinic.

- To generate a "Standard Report", select a provider in the "Choose a Provider" list box and select an assessment visit in the "Choose an Assessment" list box.

Sample Clinic Sample Clinic 1/25/2006-(S)
Assessment Date: 1/25/2006 Age Range: 0 - 0 months as of 1/25/2006

Choose a Provider	Sample Clinic	Choose an Assessment	CoCasa IRIS test-(I)
			Sample Clinic 1/25/2006-(S)

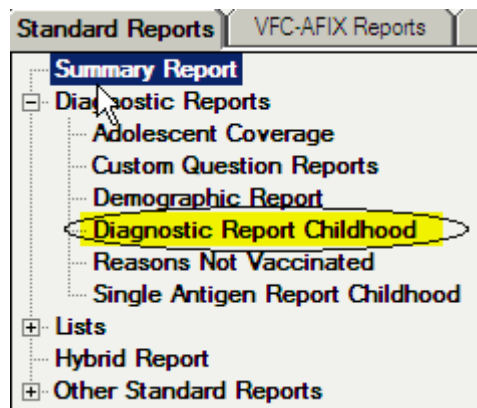
Run Report



Diagnostic Report:

Click on the + symbol by "Diagnostic Reports". This will open the Collapsible menu.

- Click on "Diagnostic Report Childhood". This opens the "Standard Report Criteria" field.



Standard Report Criteria

My Saved Criteria

Select one...
Save Criteria
Delete Criteria

Age Range:
From 0 To 0 ☒ Months ☐ Years As Of 01/25/2006

Series Or Antigens

- **My Saved Criteria:** Leave this field empty at this time.
- **Age Range:** type in "19" to "35". Check "months".
- **"As of"** put in the date you want to use for the assessment. (formerly known as Common Review Date)
- **Series:** Use the drop down bar and click on "4:3:1:3:3:1".

Compliance:
☒ By Age 24 ☒ Months ☐ Years Or ☐ By Date 01/25/2006

Set Additional Criteria:
☒ Apply ACIP Recommendations ☐ Limit by a user-selected variable
☒ Apply 4 day grace period

Immunization opportunity missed:

On LAST immunization visit

- **Compliance:** Click on "By Age", type in "24", then click "Months".
- **Set Additional Criteria:** This automatically defaults to "Apply ACIP Recommendations" and "Apply 4 day grace period". Leave these marked.
- **Immunization opportunity missed:** This automatically defaults to "On LAST immunization visit", keep this.

Important Note:

- In order to save the criteria, you must complete the required fields before saving.
- If you wish to save the criteria, go back up to "Save Criteria". Click on the "Save Criteria" button.
- A "Save Report Criteria" box opens up. Save criteria as: Name this 4:3:1:3:1 Series, then click on the "Save" button. This is now saved and known as "4:3:1:3:3:1 Series".

- Click on the "Run Report" button. "Report Viewer" screen will pop up with the "Diagnostic Report (Childhood)". Print this report.

Co-CASA Report Title: **DIAGNOSTIC REPORT (CHILDHOOD)** Date Generated: 2/21/2006

REPORT CRITERIA Assessment date: 1/25/2006

Provider site name: Sample Clinic

Age range: From 0 to 0 months as of 1/25/2006

Selected series/antigens: 4:3:1:3:3:1 (4DTaP, 3Polio, 1MMR, 3HIB, 3HepB, 1Var)

Compliance: ☒ By age: 24 months ☐ By date:

Additional criteria: ☒ Apply ACIP Recommendations (solid doses only) ☒ Apply four-day grace period
☐ Limited by

Missed opportunities are defined as: On LAST immunization visit

of patient records selected: 0

of patients moved or gone elsewhere (MOGE): 0

Total # of Patient Records Assessed: 0

SECTION I (Based on user-selected criteria)

Vaccinations Coverage: Who is up-to-date?

	Selected Series / Antigen	By: 24 months of age	
		# of patients up-to-date	% of patients up-to-date
1	DTaP4 Polio3 MMR1 HIB3 HepB3 Var1	0	NaN
2	DTaP4	0	NaN

- Buttons at the bottom of the "Report/Viewer" screen can be used to "Save" the report. If you choose to save the report; click on "Save Report" button.

Save Report | Export Report | Close Report

- Name the report and save to the default location. Close "Report Viewer" using the "Close Report" button.
- To collapse the "Diagnostic Reports", click on the - symbol by "Diagnostic Reports".

Standard Reports | VFC-AFIX Reports

Summary Report

- Diagnostic Reports

Adolescent Coverage

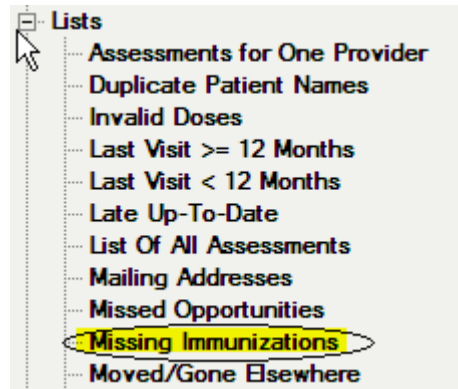
Custom Question Reports

Demographic Report

Missing Immunization Report:

Click on the + symbol by "Lists"

- Click on "Missing Immunizations". This opens up the "Missing Immunization" criteria field.



If you saved your criteria:

- Click on the drop down bar and select "4:3:1:3:3:1 Series".
- The required fields are now populated with the information that you will need to run this report!

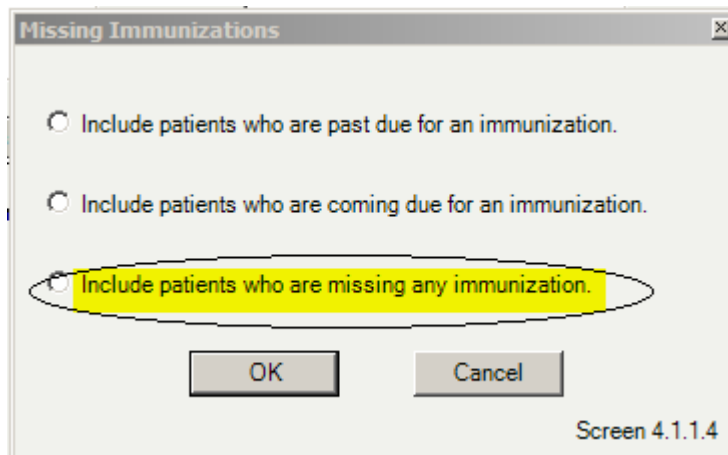
If you did not save the criteria:

- **My Saved Criteria:** Leave this field empty at this time.
- **Age Range:** type in "19" to "35". Check "months".
- **"As of"** put in the date you want to use for the assessment. (formerly known as **Common Review Date**)
- **Series:** Use the drop down bar and click on "4:3:1:3:3:1".
- **Compliance:** Click on "By Age", type in "24", then click "Months".
- **Set Additional Criteria:** This automatically defaults to "Apply ACIP Recommendations" and "Apply 4 day grace period". Leave these marked.
- **Immunization opportunity missed:** This automatically defaults to "On LAST immunization visit", keep this.

Important Note:

- In order to save the criteria, you must complete the required fields before saving.
- If you wish to save the criteria, go back up to "Save Criteria". Click on the "Save Criteria" button.
- A "Save Report Criteria" box opens up. Save criteria as: Name this 4:3:1:3:1 Series, then click on the "Save" button. This is now saved and known as "4:3:1:3:3:1 Series".
- Click on the "Run Report" button. The "Missing Immunizations" window pops up. You have several options to choose from for your report.

- Click on **"Include patients who are missing any immunizations"**. Then click on the **"Ok"** button.

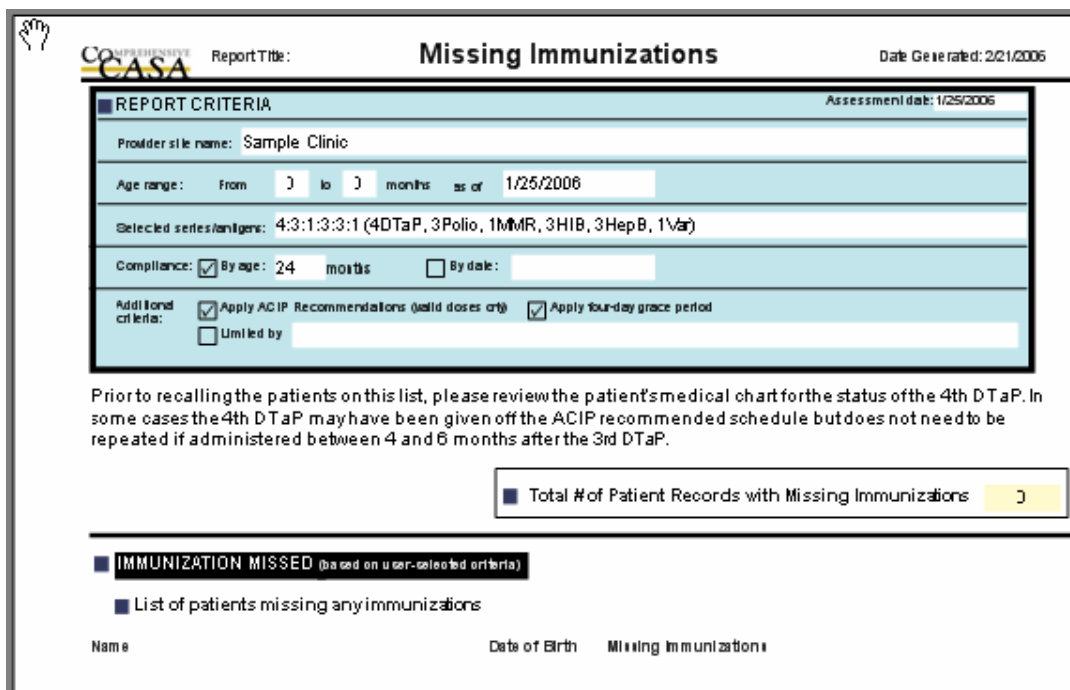


A dialog box titled "Missing Immunizations" with a close button (X) in the top right corner. It contains three radio button options:

- ☐ Include patients who are past due for an immunization.
- ☐ Include patients who are coming due for an immunization.
- ☒ Include patients who are missing any immunization.

 The third option is highlighted with a yellow oval. At the bottom are "OK" and "Cancel" buttons. The text "Screen 4.1.1.4" is in the bottom right corner.

- The **"Report Viewer"** screen will pop up with the **"Missing Immunizations"**. Print this report.



The "Report Viewer" screen for "Missing Immunizations" in CoCASA. The header shows the CoCASA logo, "Report Title: Missing Immunizations", and "Date Generated: 2/21/2006".

REPORT CRITERIA (Assessment date: 1/25/2006)

- Provider site name: Sample Clinic
- Age range: From 0 to 0 months as of 1/25/2006
- Selected series/antigens: 4:3:1:3:3:1 (4DTaP, 3Polio, 1MMR, 3HIB, 3HepB, 1Var)
- Compliance: ☒ By age: 24 months ☐ By date:
- Additional criteria: ☒ Apply ACIP Recommendations (solid doses only) ☒ Apply four-day grace period ☐ Limited by

Prior to recalling the patients on this list, please review the patient's medical chart for the status of the 4th DTaP. In some cases the 4th DTaP may have been given off the ACIP recommended schedule but does not need to be repeated if administered between 4 and 6 months after the 3rd DTaP.

Total # of Patient Records with Missing Immunizations: 0

IMMUNIZATION MISSED (based on user-selected criteria)

List of patients missing any immunizations

Name	Date of Birth	Missing Immunizations
------	---------------	-----------------------

- To save the report; click on **"Save Report"** button. Name the report and save to the default location. You will see a message, **"The report has been saved"**, click on the **"Ok"** button. Close **"Report Viewer"** using the **"Close Report"** button.

Exit CoCASA:

If you're finished working in CoCASA, click on the red X button on the top right of the screen.